Department for Work & Pensions Procedures ▸ Change - Security Details

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Change - Security Details

This procedure will take you through carrying out a change of circumstances (CofC) for the security information we hold on the 2012 system for a client.

A change to security information can be requested at any time during the life cycle of a case, and will be handled by the caseworker who has ownership of the case at the time.

If a client requests a change of circumstances via the Self Service Site, you will receive an SR generated by the client. The source will show as 'PWC (Self Service) or "NRP (Self Service)". This SR must be completed in the same way as those where the client has reported the change over the phone or by letter.
If you receive an SR which has been generated via the Self Service Site, this process will start from **Step 3**. All Self Service SRs must be actioned within 24 hours

Every client will have a seven digit personal identification number (PIN) and a special password that they have chosen themselves. A client can request a change to their security details only.

The procedure will also explain how to unblock a client if their account has been blocked following three consecutive failed security checks. You will unblock the client (where needed) and update the PIN and / or special password. The client can choose to change one or both of these if they want.

⚠️ Security details cannot be amended for a client representative. For more information refer to Client Representative - Maintain.

For more information refer to the Policy, Law and Decision Making Guidance ⚖️
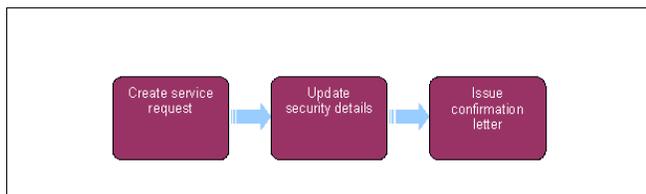
ℹ️When speaking to clients always use the new terminology - for more information refer to Terminology Changes.

Create Service Request

1. A client can ask the Child Maintenance Group (CMG) to change their security question details, or they may need to be changed due to their account becoming blocked after three consecutive failed attempts to provide their PIN.
   ℹ️ Check if the client has set up their security details prior to raising an SR, if this has not been done - see Security set up for further information.
   ⚠️ Manually built CSA Arrears Only cases will not have a TAM account created. Raise an incident with AAC.

2. If a client fails three consecutive security checks, call them back on the number held on the system. If there is no number held or if the number is unobtainable, access CIS and CRA to trace an up to date telephone number. For more information refer to Confirm Current Location. If you speak to the client, ask their customer password/PIN or three transactional questions to allow you to unblock the clients account. If the client passes the security check, raise the CofC SR below.

   If the client fails the security check again explain that their account will be blocked and you will need to send them a form to submit new security question details. Create a new service request (SR) by selecting the following options:

   - **Process = CofC**
   - **Area = Change Personal Info**
   - **Sub Area = Change Contact/Security Info**

   ℹ️ Create the above SR if the client cannot be contacted with an outbound call.

   The **Source** is the person who is reporting the change in the **Last Name** and **First Name** fields of the SR, from the **Source** dropdown select their role on the case e.g. NRP or PWC.

3. Select the **MVG** button and add the case number, select **Ctrl and S** under the subject details.

4. In the **CoC More Info** tab enter the details of the person that the change relates to in the **Subject Details field** and select their role from the **Subject Type** dropdown e.g. NRP or PWC.

5. Change the SR **Status** to **In Progress**, the 2012 system will generate an activity plan at this point.

6. Update the first activity plan step outcome to **Security Details**. Then change the SR **Sub Status** to **Security Details** and update the activity plan.

7. Update the **Notes** to reflect whether the account has been blocked or the client requests to provide new security details in writing, then send CMSL9800 using the **Letter (Outbound)** activity to the client and explain that they need to return this before we can speak to them on the phone. Set the SR **Status** to **Wait** and input a next action due date seven days in the future.

8. If the client fails to return the form after seven days issue CMSL9801 reminder letter and set the SR **Status** to **Wait** for a further seven days. Without the security details the client will be unable to speak to the CMG about their case.

   Prior to updating a clients security details, ensure that the clients account has not previously been blocked by selecting **Go To Contact** button then **Errors** tab to check for message **TAM account is blocked**. If previously blocked complete **step 9.** If Not previously blocked continue to **step 10**. When verification received consider if SMS is appropriate - for more info refer to SMS Text

9. Select **Unblock User** in the **CofC More Info** view.

10. Update the activity plan outcome to show whether the client has provided enough information to change their security details. If no response from the client following the issue of CMSL9800/9801, then reject the change. If the change has been reported through the Self Service Site continue to **step 11**. If the change is not reported from the Self Service Site update the SR **Sub Status** to **Assess Outcome Of Change** and refer to the relevant steps:

   - **Accept change** – update the security details by referring to **step 11**

   - **Reject change** – decline the change to security details by referring to **step 19**

Update security details

11. Select the **Change Security Detail** button and within the screen select the **Update** checkbox.

12. Changes the client's seven digit PIN and/or special customer password. The PIN cannot be all zeroes. There is no requirement to collect/change information for the seven memorable questions, input an X in these fields.

13. Select **Submit** to update the system.

14. Remind the client that their security details are important and should be kept safe as this information will be needed for every phone call with the CMG.

    Confirm the spelling and format of the answers with the client and stress that they need to be confident that they will be able to remember their security details for future use.

15. If the client wants to add/remove a representative as a contact on the case, select the **Communicate with Client Rep** checkbox in the **Subject New Contact/Security Details** applet in the **CofC More Info** view.

Accept Change

16. Update the SR **Sub Status** to **CofC Accept**.

17. Where the client has changed their details by returning the CMSL9800, issue an SMS to the client to confirm that their details have been updated. For more information refer to SMS Text. If an SMS is not appropriate, issue CMSL9802.

18. Return to CoC more info view, standard sub-view and close the SR by changing the **Resolution Code** to **CofC Accepted**, then changing the SR **Status** to **Closed** and the **Sub Status** to **Complete**.

Decline change

19. Update the activity plan **Outcome** with the reason why you're rejecting the change **CoC Declined**. Update the SR **Sub Status** to **CofC Declined.**

20. Close the SR by changing the **Resolution Code** to **CoC Rejected** then changing the **Status** to **Closed** and the **Sub Status** to **Complete.**

CMSL9800 We need to update your security details

> Failed security details – client has failed their security check and we enclose a change to security details form.
>
> All fields in this letter are system generated. Review the letter before sending.

CMSL9801 Reminder – we need to update your security details

> After client fails their security details we send them a form to update their security details. This is a reminder letter sent after 7 days to remind client to fill in form or they won't be able to speak to the CMG about their case.
>
> All fields in this letter are system generated. Review the letter before sending.

CMSL9802 Thank you for updating your security details

> Confirmation letter to client confirming their details have been updated.
>
> All fields in this letter are system generated. Review the letter before sending.

Client Representative - Power Of Attorney

Client Representative - Set Up

Client Representative - Maintain

Client Representative - Remove

Security Check

Security Set Up

Terminology Changes

Are the security details case sensitive?

The security details are not strictly case sensitive, however in the context of the self service portal they are. This is because clients will need to enter details as they originally recorded them e.g. any capital letters originally recorded will always need to be entered as capital letters.

Does the client and their representative share security information?

No, they will each have their own security details.

Do we overtype the security details already held?

No, having selected update security QA tab the questions are listed, with current answers greyed out, there is box next to each question where you can type in the new answer/s.